

Enterprise Reporting for the Modern Web

To view financial detail by Purchase Order, Voucher or Supplier (formerly known as Vendor), navigate to the WISER Main Menu and choose the 'Find POs, Vouchers, Vendors' link under the 'AP/PO' heading.

WISER	≡ Main Menu 🝷	III Home		
Departme	ents		AP/PO	
Find Depar	rtments		Find POs, Vouchers, Vendors	
Projects			Expenses	
My Project	S		Find Expense Reports	
Find Projec	cts		Payroll	
			Find Salaries & Encumbrances	

Purchase Order (PO) Search

On the 'Find AP/PO Data' page, select the 'PO Search' link in the first box to reach the PO Search screen.

hoose a search below		
PO Search	Voucher Search	Vendor Search
and available balances.	The to Dachhoard	File to Dachbeard

Search for Purchase Orders

On the next screen, one can 'Find POs' using the search field options.

PO ID	PO Ref	
Starts With	Contains 🔻	
PO Date	РО Туре	
Is Exactly	•	
Total Amount	Dept	
Equals	Starts With 💌	
Vendor Name	Project	
Contains 💌	Starts With 💌	
Vendor ID		
Contains 💌		

PO Search



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On the 'Find POs' search screen, are the following search fields:

PO Search Options

PO ID PO Date Total Amount Vendor Name Vendor ID PO Ref (Reference) PO Type Dept Project

The **PO ID** field allows the user to search on complete or partial PO ID. **PO Date** can be an exact date or a date range. **Total Amount** is the total dollar amount of the purchase order equal to, greater than or less than the value entered. **Vendor Name** allows the user to search on purchase orders related to a specific supplier by name or partial name. The **Vendor ID** field will search on the exact or partial Vendor ID number. The PO Reference field may have relevant PO information, or it may be blank, depending on how individual institutions use this field in SFS. A full dropdown list of **PO Type** is available for searching. Also available are the **Department (Dept)** and **Project** values relating to the purchase order(s).

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Find POs Search Results								
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PO Date	РО Туре	• Searc	h field	s are r	not ca	se sensitiv	e in WISEF	₹.
Is Exactly								
Total Amount	Starts With	Any c	ombin	ation	of ava	ilable sear	ch fields r	nay
Vendor Name	Project	be us	ed to r	arrow	/ and	expedite s	earch	
Contains 💌 o	Starts With 💌	reque	ests.					
Vendor ID								
Contains		• Q _T	o upda	ite yo	ur sea	rch criteria	a, click the	!
	Reset	magn	ifying	glass.				
Find POs Search Res	sults							
							_	
Q « 1 » 1-2 of 2							₽ <p< td=""><td>ashboard</td></p<>	ashboard
Q < 1 > 1-2 of 2							or ₽ Pin to D	ashboard
Q (1) 1-2 of 2	dor ID Vendor Name	PO Ref	РО Туре	Dept	Project	Total Amount	Paid Amount	ashboard Balance
PO ID PO Date Status Ven 374119 11/01/2016 Dispatched 0000 388112 12/18/2017 Dispatched 0000	dor ID Vendor Name 100547 EO Johnson Office Technologies 150411 SAMUELS GROUP INC. THF	PO Ref	PO Type General General	Dept 025050 306001	Project	Total Amount \$680.00 \$621.60	Q→ Image:	Balance \$680.00 \$621.60
PO ID PO Date Status Ven 374119 11/01/2016 Dispatched 0000 388112 12/18/2017 Dispatched 0000	dor ID Vendor Name 100547 EO Johnson Office Technologies 150411 SAMUELS GROUP INC, THE	PO Ref DCON-13-5665	PO Type General General	Dept 025050 306001	Project	Total Amount \$680.00 \$621.60	Q→ ∓ Pin to D Paid Amount \$0.00 \$0.00 \$0.00	Balance \$680.00 \$621.60

PO Search Example and results

On the 'Find POs Search Results' page, click any heading to sort the data by that field. The **Vendor ID** and **PO ID** fields are clickable hyperlinks, which take the user to respective detail information. The PO ID link pulls up the Purchase Order detail



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information page which includes PO Line, Distribution and AP Invoice data for that purchase order.

PO Da 11/01/	ate /2016	Stat Disp	oatched	1	Balance \$680.00		Vendor 0000100547 EO Jo	ohnson Offic	e Tech	inologie	15	Buyer Na CHARKOW	me ISKI,DENISE
Line	es												
L	ine No.		ltem D	escription			Category (NIGP	Code)	U	ом	Qty	Amount	Status
	1 11	/1/2016 - 10/31/20	17 Maintenance Agr	reement			93955		EA		1	\$680.00	Approved
Dist	tributior	Sched No.	Account	Fund	Dept	Project	Program	Class	PO	Qty	Status	Merc	h Amount
	1	1	2460	136	025050		6			1	Canceled		\$0.0
	1	1	2460	136	025050		6			0	Open		\$680.0
	Sched No.	,	Voucher ID		Payment Date		Line No.	Qt	y Vouch	ered		Merch Am	ount \$0.
tail	Sched No.	0547	EO Johns	on Off	Payment Date	nologi	Line No.	Qt	y Vouch	ered		Merch Am	ount \$0.0
tail DO Idor I Iohns Box 2 Iress Box 2 Iison,	Sched No.	0547 Chnologies 290 Search	EO Johns	on Off E W Y	Payment Date Fice Techr hort Name OJOHNSONO-00 /9 On File? es	nologi	Line No. CS Status Approved W9 Effective Dat 06/17/2009	Qt	Venc Corp	dor Cla:	55	Merch Am	ount \$0.
tail DO Johns Box 2 dison,	Sched No.	0547 chnologies 290 Search	EO Johns	on Off E W Y	Payment Date	nologi	Line No. CS Status Approved W9 Effective Dat 06/17/2009	Qt te	Vena Corp	dor Cla	55	Merch Am	ount \$0.1
tail DO Idor I Iress Box 2 dison, CEI	Sched No.	0547 chnologies 290 Search	Voucher ID EO Johns Vendor N	on Off E W Y	Payment Date	nologi n	Line No. ES Status Approved W9 Effective Dat 06/17/2009 PO Type	Qt te	y Vouch Venc Corp	dor Cla: oration	55 Total Amount	Paid Amoun	t Balar
tail DO Idor I Johns Iress Box 2 dison, CCEI 1 1 1 1 1 1 1 1 1 1 1 1 1	Sched No. Name Son Office Tec 2290 , WI 53701-2 nt POS 2 1-12 of PO Date 11/14/2017	0547 Chnologies 290 Search 12 Vendor ID 0000100547	Voucher ID EO Johns Vendor N EO Johnson O Technologies	on Off	Payment Date Fice Techr fort Name OJOHNSONO-00 /9 On File? es PO Rei DCON0595ENT- MFDCOPIER-05	nologi n f M15-	Line No. ES Status Approved W9 Effective Dat 06/17/2009 PO Type General	ee De 607:	Venc Corp	dor Cla: dor Cla: Project	55 Total Amount \$5,874.5	Paid Amoun 22 \$0	t Balar 00 \$5.87
tail dor I Johns Iress Box 2 dison, CCEI 1 1 1 1 1 1 1 1 1 1 1 1 1	Sched No. Name son Office Teo 2290 , WI 53701-2 nt POS > 1-12 of PO Date 11/14/2017 11/09/2017	0547 chnologies 290 Search 12 Vendor ID 0000100547 0000100547	Voucher ID EO Johns Vendor N EO Johnson O Technologies EO Johnson O Technologies	on Off	Payment Date Fice Techr fort Name OJOHNSONO-00 /9 On File? es PO Ref DCON0595ENT-MFDCOPIER-05 DCON-505ENT-MFDCOPIER-05	nologi n f M15- v15-	Line No. ES Status Approved W9 Effective Dat 06/17/2009 PO Type General General	ee Pee te 607: 400-	y Vouch Corp 900 Pt 3000 2424	dor Cla: oration	55 Total Amount \$5,874.5 \$6,230.4	Merch Am Paid Amoun 2 \$0 14 \$0	t Balar 00 \$5,83
dor I ohns ress 30x 2 ilison, cCEI 1 JID 1133 1125 1060	Sched No. Name son Office Tea 2290 , WI 53701-2 nt POS 1-12 of 11/14/2017 11/09/2017 09/27/2017	0547 chnologies 290 Search 12 Vendor ID 0000100547 0000100547	Voucher ID EO Johns EO Johnson O Technologies EO Johnson O Technologies EO Johnson O Technologies	on Off	Payment Date Fice Techr fort Name OJOHNSONO-00 /9 On File? es PO Ref DCON0595ENT-MFDCOPIER-05 DCON-505ENT-MFDCOPIER-05 DCON-505ENT-MFDCOPIER-05	rologi n f M15- M15- M15- M15-	Line No. ES Status Approved W9 Effective Dat of/17/2009 PO Type General General General General	ete Pe te 6073 4004 501	y Vouch Corp 300 424 128 2	dor Clai oration	55 Total Amount \$5,874.5 \$6,230.4 \$2,381.7	Merch Am Paid Amoun 22 32 4 \$2,381	t Balar 00 \$5,87 00 \$6,23

MFDCOPIER-05

Supplier Detail

Technologies



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The PO Search page results can be exported to Excel or pinned to the Dashboard.



Voucher Search

To view financial information by Voucher, users can select the middle box on the 'Find AP/PO Data' search page and click the 'Voucher Search' option.



Voucher Search

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Voucher Search Options

Voucher ID
Invoice Number
Invoice Date
Payment ID
Vendor ID
Vendor Name
PO ID
Journal Date
Line Description
Amount
Dept
Project
Include Payroll Deductions

The 'Find Vouchers' search screen lets the user search on a full or partial **Voucher ID** or AP **Invoice Number**. The **Invoice Date** can be on a specific date, before or after a specific date, or it can be a range of dates. Users can also search on the **Payment ID** number, **Vendor ID**, all or part of the **Vendor Name** (not case specific) and a full or partial **PO ID** associated with the Voucher. The Journal Date or date range, the Voucher **Line Description** and dollar **Amount** of the Voucher are also available as limiting criteria fields. In addition, the ChartField values of **Fund**, **Dept**, **Project** and **Account** can also be used to search for Vouchers. There is also a checkbox to "**Include Payroll Deductions**" in your Voucher search. The default is set to unchecked (not include Payroll Deductions).

Contains fox	Starts With
PO ID	
FOID	Account
Contains 💌	
contains	
Include Payroll Deductions	
	Coarch
	Search

Include Payroll Deductions Option

Once the user clicks search, the search itself can be pinned to a Dashboard or the search result information can be exported to Excel.

	4	Pin to Dashboard
	🛓 Export to Excel	
In	Records per page	escription
EL	25	APR-JUNE
1	✓ 50	able
	100	abic
EL	500	/able

Pin the search to Dashboard or use the gear dropdown to choose "Export to Excel"



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As with the PO Search, the Voucher Search allows users to drill into the hyperlinked Voucher ID and Supplier (Vendor) ID values on the Search Results page.

ind Vc	ouchers se	earch Results				
« 1 » 1-1	Sr ∓ Pin to Dashb					
Voucher ID	Voucher Unit	Invoice No.	Invoice Date	Vendor ID	Vendor Name	Description
00043127	UWSYS	2Q17	07/03/2017	000002034	FOX WORLD TRAVEL	ADMIN FEES APR-JUNE
00043162	UWSYS	000177634	07/01/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043204	UWSYS	AMP0501526	05/01/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043205	UWSYS	AMP0727571	07/27/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043206	UWSYS	AMP0728574	07/28/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043207	UWSYS	AMP0727572	07/27/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043252	UWSYS	000181452	08/01/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043299	UWSYS	000185320	09/01/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043355	UWSYS	000188906	10/01/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043439	UWSYS	193192	11/01/2017	000002034	FOX WORLD TRAVEL	Accounts Payable
00043514	UWSYS	000196654	12/04/2017	000002034	FOX WORLD TRAVEL	Accounts Payable

Gross Amount (10,714.00		2Q17	0	7/03/20)ate 17	Vendor 0000002034	FOX WORLE	TRAVEL			Status Posted	Due Dat
		Discount Amoun \$0.00	it F \$	reight A 0.00	mount	Sales Tax A \$0.00	mount					
Attachment	S											
√o attachments are	associa	ted with this vouche	20.									
Ines												
Vchr Line No		Item ID	Qty Vchr'd		UOM	Unit Price		Descriptio	on		Merch An	nount
	1			0		0.000	ADMIN FEES	APR-JUNE				\$10,714.0
												\$10,714.0
Distribution Vchr Line No.		Distrib Line No.	Account	Fun	d Dep	t Project	Program	Class	Qty V	chr'd	Monetary	Amount
	1	1	2620	106	4010	00	1			0		e10 71 4 4
												\$10,714.0

Voucher Detail Page



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Vendor Name FOX WORLD TRAVEL	Short Name FOXWORLD-001	Status Approved	Vendor Class Outside Party
Address 2150 S WASHBURN ST PO BOX 2386 OSHKOSH, WI 54903-2386	W9 On File? No	W9 Effective Date	
Recent POs Search			
No results were found.			
Recent Vouchers			

Supplier (Vendor) Detail Page

Supplier (Vendor) Search

From the "Find AP/PO Data" page, users can find valuable information about Suppliers and related transacations by clicking on the 'Vendor Search' link.

hoose a search below.		
PO Search	Voucher Search	Vendor Search
Find purchase orders, view encumbered amounts and available balances.	Find vouchers using a wide array of search criteria.	Find vendors and their related POs and vouchers.

Supplier (Vendor) Search Options

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WISER: Find POs, Vouchers, Suppliers (Vendors)

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Find Vendors			The full 10-di remaining nu	The full 10-digit <i>Vendor ID</i> can be entered in the <i>Vendor ID</i> field, or the remaining numbers once the zeros are truncated. The <i>Vendor ID</i> field defaults to an "ends in." type of search. So, if one enters "17" the					
	Vendor ID Q		search will re	triev	e Vendor e Vendor e Vendor	ID "0000000 ID "0000000	0017". If one ente 1785".	rs "1785", the	
	Contains Vendor Status All Street Address Contains City Starts With State Starts With Starts Starts With Starts With Starts With Starts With	Search	The Vendor N Using the Ven Suppliers, 'Un their Supplier Street Addre are searchabl Once the user information re page which pro Vouchers.	Name ndor nappi r sear ss, Ci le fiel clicks quest ovide	e field will Status fie roved' Sup rch based ty , State , Ids for Sup Search, th red. There greater de	allow for fu ld, users can opliers or all on physical Postal Code oplier addre ne search res are clickable tail on the Su	Il or partial Suppli n look for 'Approv Suppliers. Users of location informat (Zip Code) and C ss information. ults page provides t hyperlinks on the So upplier, any associat	er name entry. ed' status can narrow ion also. The ountry fields the Supplier earch Results ted POs and/or	
٩	« 1 2 3 4	Drill i	n for Supplier, PO of 787	or Supplier, PO or Voucher details					
	Vendor ID	Vendor Nan	ne	POs	Vouchers	W9 On File?	W9 Effective Date		
	0000008290	21ST CENTURY TEXTS		POs	Vouchers	No			
	000005753	4 SEASONS PRESS		POs	Vouchers	No			
	0000004004	A & E CONTRACTORS/RENTAL/SUPPLY		POs	Vouchers	No			
	0000004032	A D F VIDEO		POs	Vouchers	No			
	0000004348 A-R EDITIONS INC 00000017429 ABBOTT PLASTICS			POs	Vouchers	No			
				POs	Vouchers	No			
	0000012109 ACCESS TO INDEPENDENCE, INC			POs	Vouchers	No			
	0000004088 ACME PHOTO FINISHING			POs	Vouchers	No			
	0000005730 ADMINISTRATION, DEPARTMENT OF			POs	Vouchers	No			
	000000127	AEROTEK		POs	Vouchers	No			
	0000012658	AESENTION, INC		POs	Vouchers	No			
	0000013728	AHLSTEDT, DEBORAH		POs	Vouchers	No			

Cannot go further – no data to show



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Have questions or comments? Please contact <u>wisdm-bug@lists.wisc.edu</u> or click the link in the bottom right hand corner of any WISER page.

Document Revision History

Author	Version	Date	Description of Change
Stacy VanWormer	1.0	02/19/2018	Initial Draft